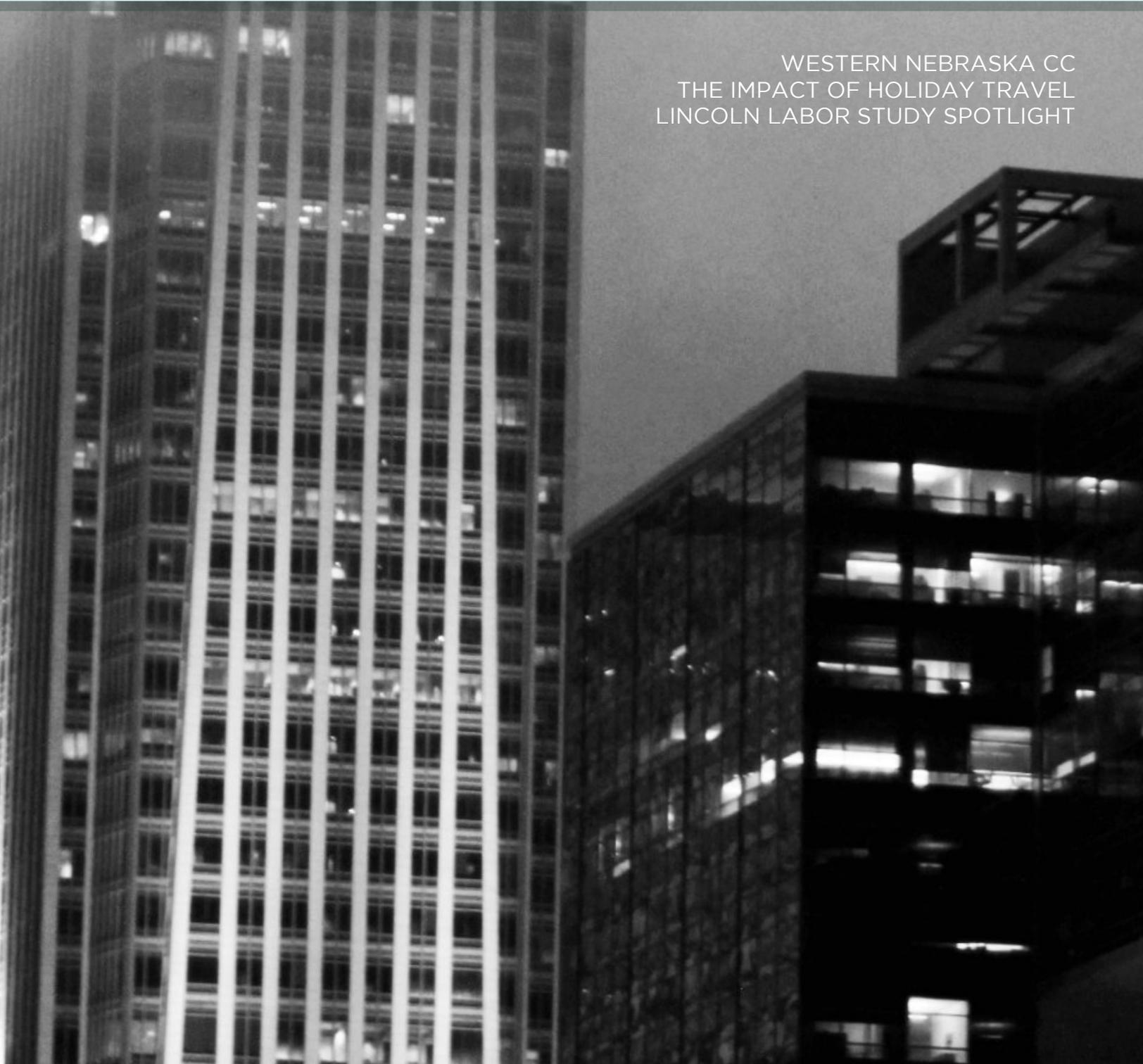


NEBRASKA WORKFORCE TRENDS

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NEBRASKA
DEPARTMENT OF LABOR

.....
DEC 2014



WESTERN NEBRASKA CC
THE IMPACT OF HOLIDAY TRAVEL
LINCOLN LABOR STUDY SPOTLIGHT

CREDITS

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OCTOBER UNEMPLOYMENT DATA

Byron Lefler, Research Analyst

LINCOLN MSA (not seasonally adjusted)
 October Unemployment Rate: 2.3%
 October Total Non-farm: 189,772
 Manufacturing: 13,916
 Largest OTM Increases:
 Trade, Transportation, & Utilities: 515 (1.5%)
 Education & Health Services: 354 (1.2%)

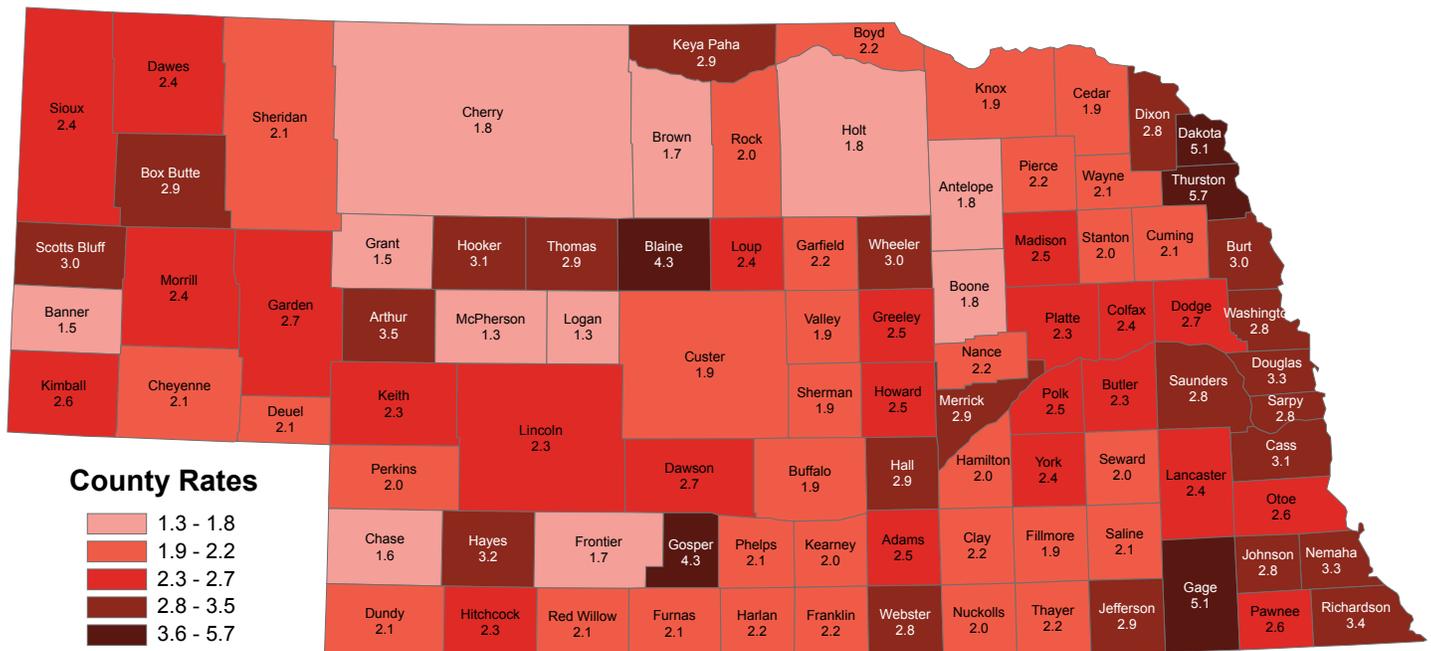
OMAHA MSA (not seasonally adjusted)
 October Unemployment Rate: 3.2%
 October Total Non-farm: 485,032
 Manufacturing: 32,513
 Largest OTM Increases:
 Education & Health Services: 1,049 (1.4%)
 Trade, Transportation, & Utilities: 503 (0.5%)

NEBRASKA (not seasonally adjusted)
 October Total Non-farm: 999,517
 Manufacturing: 97,437

Nebraska (smoothed seasonally adjusted)
 October Unemployment Rate: 3.4%
 Change (OTM): -0.2%
 Change (OTY): -0.4%

Economic Regions (not seasonally adjusted)
 Central: 2.1%
 Grand Island: 2.8%
 Mid Plains: 2.3%
 Northeast: 2.7%
 Panhandle: 2.6%
 Sandhills: 1.9%
 Southeast: 3.1%

OCTOBER UNEMPLOYMENT RATE BY COUNTY



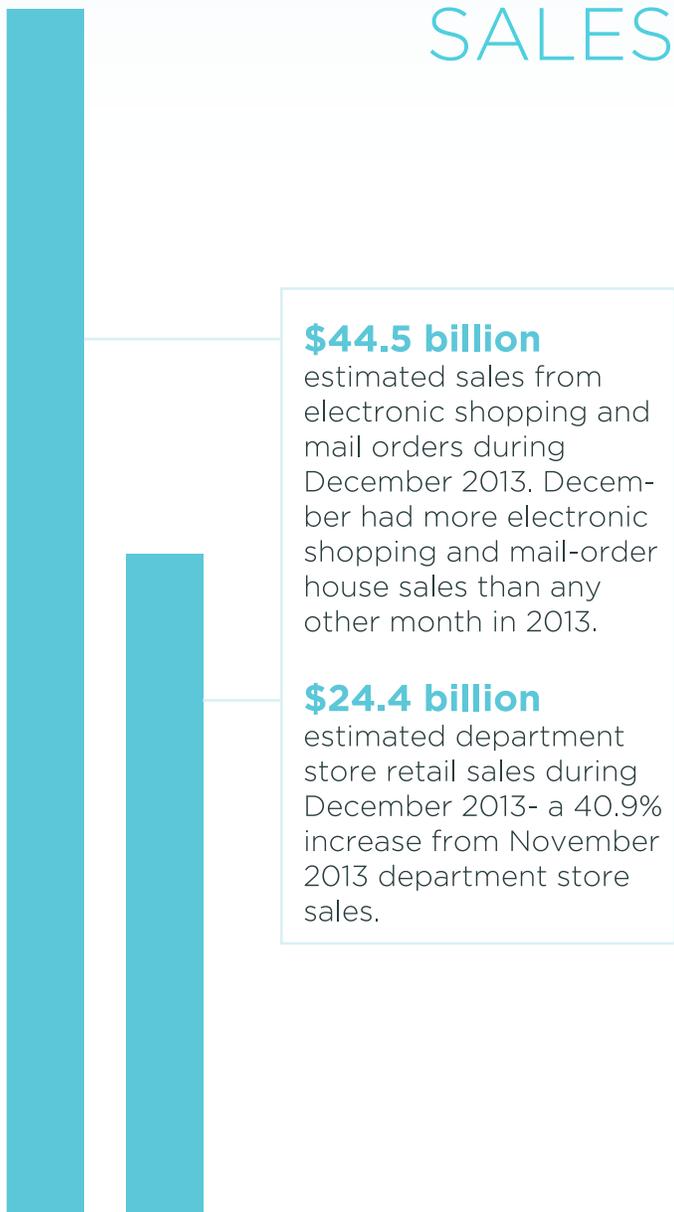
Sources:

1. Bureau of Labor Statistics Current Employment Statistics Program (CES)
2. Bureau of Labor Statistics Local Area Unemployment Statistics (LAUS)

FAST FACTS THE HOLIDAY SEASON

Kristin Derenge, Research Analyst

The holiday season is full of travel, gift giving, and time with family. It is also often the busiest time of year for retail and online sellers. The following figures from the US Census highlight some of the economic activity related to the holiday season.



MAIL

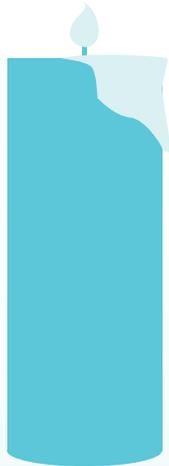
450-470 BILLION

The estimate of the parcels of mail that will be delivered between November 17 and Christmas Day 2014 by the US Postal Service.

12%

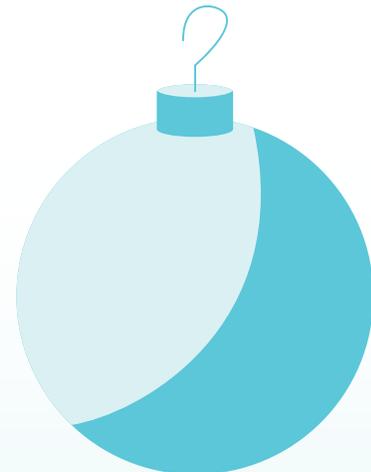
The estimated increase in packages of mail that will be delivered between November 17 and Christmas Day 2014 by the US Postal Service over the same period last year.

HOLIDAY DECORATIONS



\$1.6 BILLION

The estimated value of candles shipped by US manufacturers in 2012. Candles are commonly lit for Diwali, Hanukkah, and Kwanzaa, among others.



\$1 BILLION

The value of Christmas tree ornaments imported to the US from China between January and September 2014. China also shipped more artificial Christmas trees to the US than any other nation-\$137.5 million worth from January to September 2014.

Source:

United States Census Bureau. Facts for Features. The 2014 Holiday Season. [Online] December 4, 2014. [Cited: December 4, 2014.] http://www.census.gov/content/dam/Census/newsroom/facts-for-features/2014/cb14ff-27_holiday_season.pdf

LABOR AVAILABILITY REPORT WEB SPOTLIGHT

Kermit Spade, Research Analyst

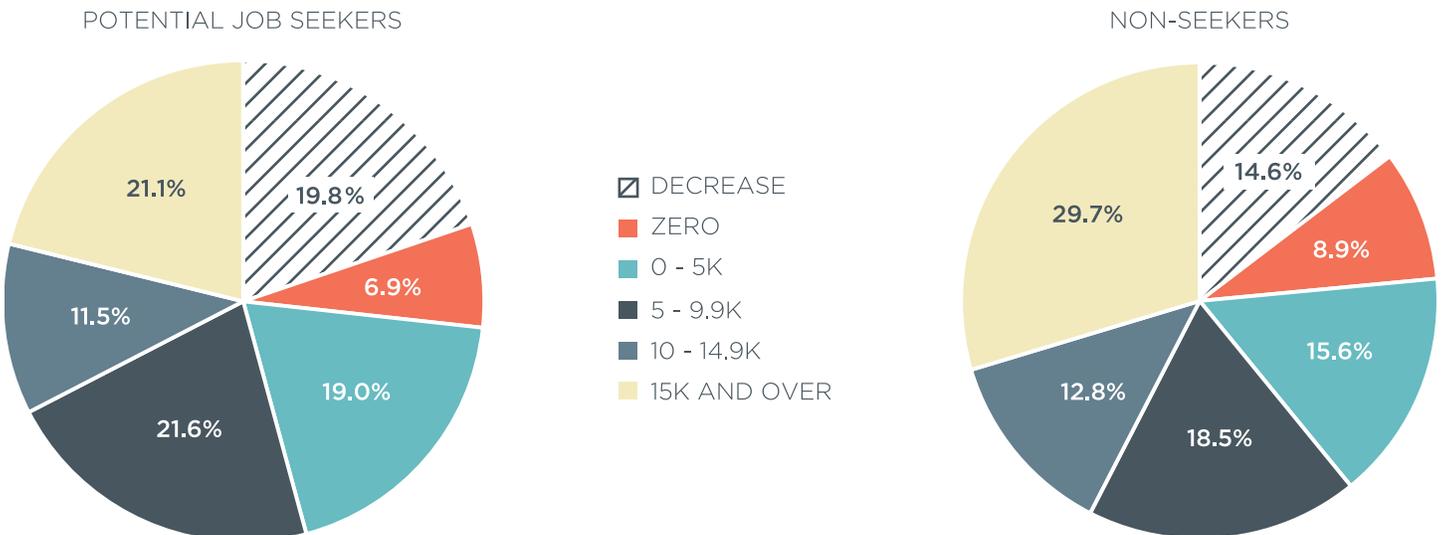
“Labor availability” describes how many people within a given area are available and willing to take on a new job. In the summer of 2014, the Nebraska Departments of Economic Development and Labor collaborated on a survey designed to measure labor availability in the Lincoln and Omaha metro areas of Nebraska.

The resulting report features detailed demographics, commuting patterns, skills and education, hours worked, pay and benefit expectations and other characteristics of potential job seekers. Analysis includes the factors that are important to those seeking new employment as well as barriers that may prevent people from taking a new job.

Results of the Metro Area Labor Availability Survey, which included the Lincoln and Omaha metro areas in Nebraska, revealed that there are an estimated 247,692 potential job seekers in the Lincoln survey area. The majority of these potential job seekers are currently employed. Others are out of work or seeking to reenter the workforce after time spent in retirement or homemaking. Results of the Omaha study will be released in January 2015.

These potential job seekers indicated that they are willing to take new work or change jobs in the next year if a suitable job presents itself. The median wage sought by this group is a minimum of \$40,560 annually, or \$19.50 an hour for full-time, year-round work. Nearly all (97%) potential job seekers stated that they are willing to commute 15 minutes or more each way for suitable work. The median tenure of employed potential job seekers at their current job is three years. More than half said they have at least a bachelor’s degree. Potential job seekers identified salary, use of skills they already possessed, and a schedule that fit their needs as the most important factors in improving their employment situation. They named inadequate pay offered by area employers, lack of job opportunities in the area, and inadequate benefits offered by area employers as the most common barriers to improving their employment situation.

////// MINIMUM PAY INCREASE NEEDED TO CHANGE JOBS //////////////////////////////////



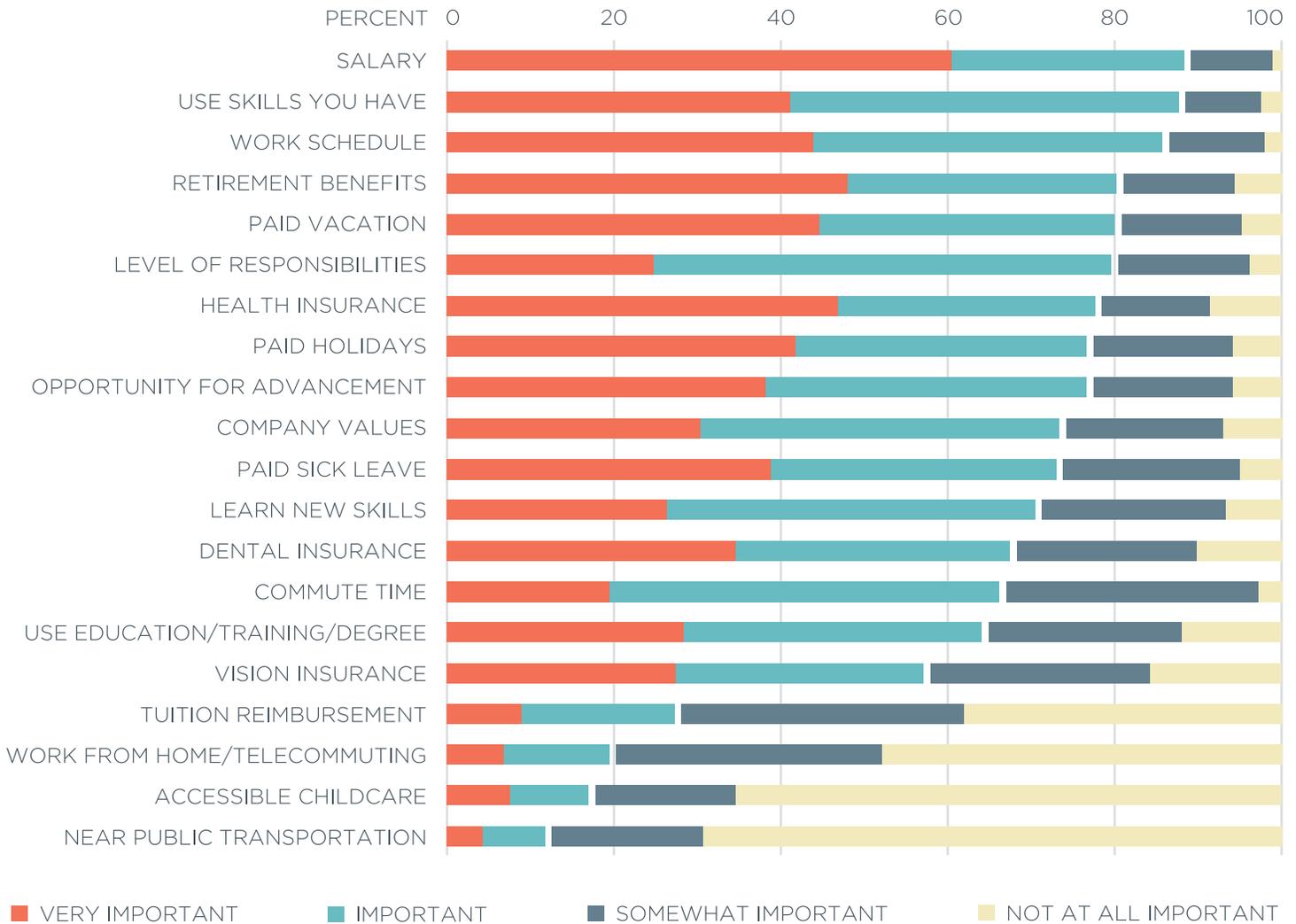
According to survey results, over a quarter of potential job seekers in Lincoln would not need a pay increase in order to improve their employment situation. In fact, 19.8% of potential job seekers would take a pay cut for the right job. Those who are not potential job seekers would require a larger wage increase in general to switch jobs: 21% of potential seekers would require at least a \$15,000 raise to improve their employment situation, while 30% of others would say the same.

Only responses that listed both a current wage and minimum pay requirement to change jobs were included in the analysis of wage increases. Non-seekers were defined as those who did not answer ‘yes’ or ‘maybe’ when asked if they would reenter the workforce or change jobs in the next year.

FACTORS IMPORTANT TO POTENTIAL JOB SEEKERS

There are many factors to consider when choosing a new job or deciding to make a career change. Potential job seekers in the Lincoln area were asked to rate the importance of 20 items frequently considered when choosing a place of employment. Blank responses were not counted in any of the analysis of important factors.

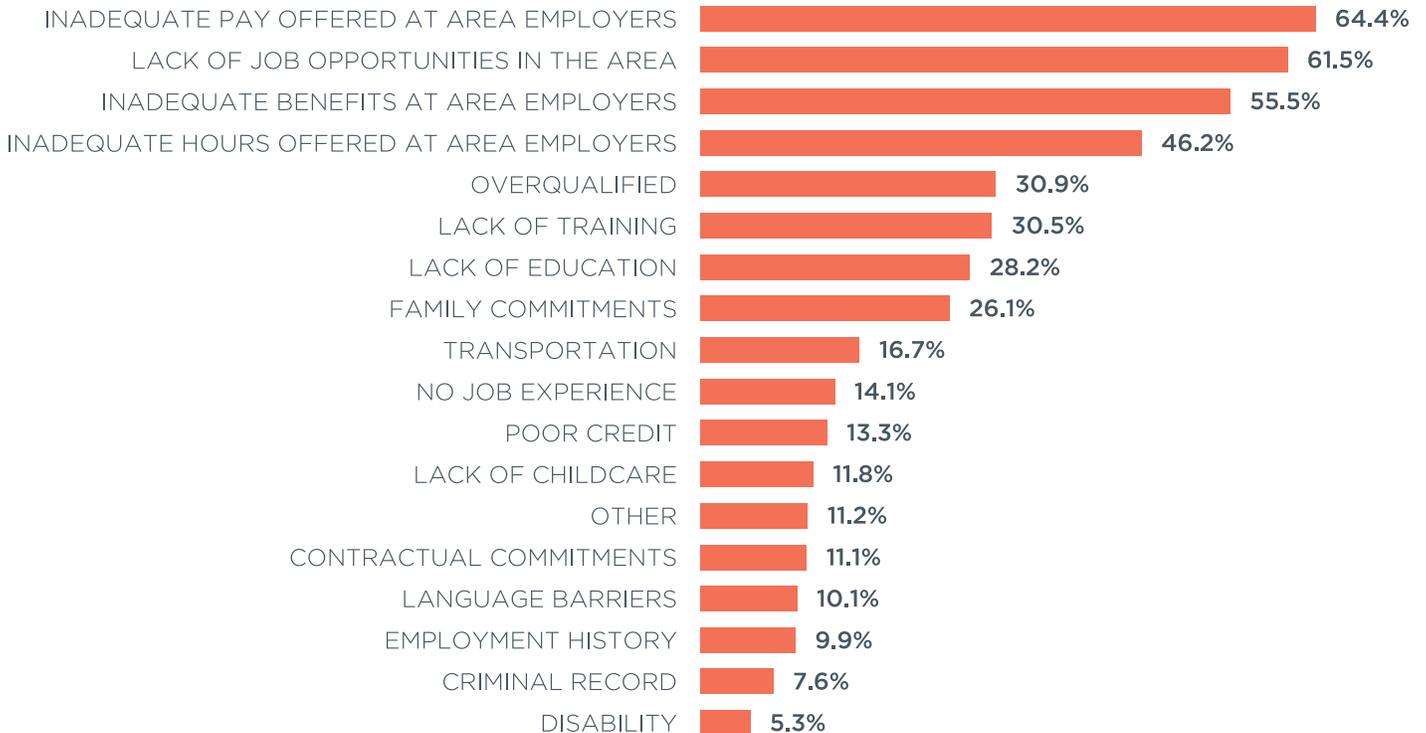
FACTORS IMPORTANT TO POTENTIAL JOB SEEKERS



Of those potential job seekers who answered questions about the most important factors they look for in a job, 89.1% said salary was either important or very important to them. Salary was the only factor that over half of respondents listed as very important. The top five important factors to potential seekers based on ratings of very important or important were salary, using skills they already have, work schedule, retirement benefits, and paid vacation. Potential job seekers in Lincoln didn't seem to value tuition reimbursement, working from home, accessible childcare, and proximity to public transportation as much as other factors, with 30% or fewer seekers listing these factors as important or very important to them.

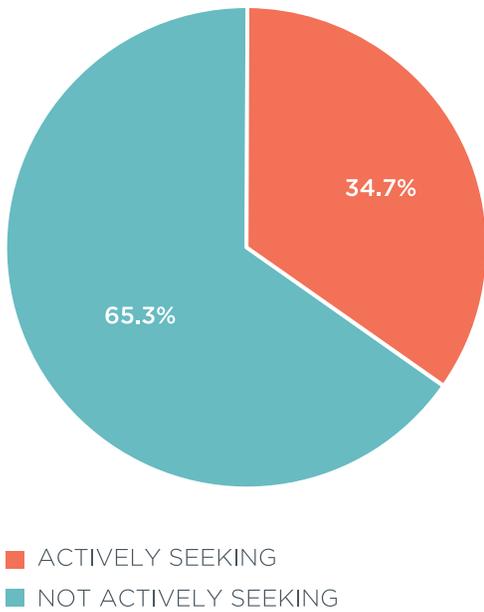
BARRIERS TO POTENTIAL JOB SEEKERS

OBSTACLES OF EMPLOYMENT AMONG POTENTIAL JOB SEEKERS



Of the potential job seekers who answered questions about employment obstacles, over 60% listed inadequate pay and lack of job opportunities as obstacles to changing jobs or reentering the workforce within the next year. Inadequate benefits and inadequate hours were also commonly cited by potential job seekers as obstacles to employment at 55.5% and 46.2% respectively. All four of the most commonly cited obstacles to employment (inadequate pay, lack of job opportunities, inadequate benefits, and inadequate hours) were job market-related issues rather than workforce-related issues such as lack of experience and training.

POTENTIAL JOB SEEKERS ACTIVELY SEEKING A NEW JOB



Active job seekers are a subset of potential job seekers that indicated they were actively looking for a new job. Potential job seekers were asked if they were actively seeking a new job. Among potential job seekers who answered the question, 34.7% indicated that they were actively seeking a new job. In the Lincoln survey area, this is estimated to be up to 85,949 potential job seekers that are actively seeking new jobs.

Many factors can affect labor availability in a regional labor market. Geography, pay and benefits, education and skill requirements, work schedules, and many other factors are considered in someone's decision to take a job. The Lincoln Labor Availability Report examined the employee side of the equation, namely, the views of the workers. What do they desire in a job? What do they see as obstacles to employment?

This study has identified that there is a large pool of potential job seekers in the Lincoln labor market area. The findings can be used to better understand what is important to these potential job seekers and the barriers they may see to accepting a new job. Economic developers, educators, employers, legislators, and others involved in shaping the local economy can use this information to help existing businesses grow and attract new employers and workers to the area.

While the Metro Area Labor Availability Survey focused on employee perspectives of labor availability, a survey conducted by the University of Nebraska-Lincoln Bureau of Business Research (UNL-BBR) collected corresponding data from employers. The Make it Work for Lincoln survey was conducted by UNL-BBR under contract with the Nebraska Department of Labor and with the participation of the Nebraska Department of Economic Development. The report examines the types of occupations Lincoln area employers are searching for and hiring, and the types of difficulties employers face when hiring. The survey also asks about the types of training which employers provide.

Copies of the full report for both the household and business surveys are available at:

<http://networks.nebraska.gov/gsipub/index.asp?docid=802>



Kermit Spade
Research Analyst

OMAHA

305 JOBS IN THE OMAHA AREA

OPENINGS	TYPE OF BUSINESS	JOB #	SOURCE OF INFO
Blue Pomegranate Gallery	Art & craft gallery	4	Strictly Business Magazine
Real Deals on Home Décor	Furniture and home décor	2	Omaha World Herald
Spaces Apartments	154 units of apartments	2	Omaha World Herald
JB Meats- Blair	Meat market	5	Blair Chamber of Commerce
Great Clips	Hair Salon	8	Fremont Tribune
Holiday Inn Express (132nd)	78 room hotel	25	Omaha World Herald
SkyZone	Indoor trampoline park	20	Omaha Chamber of Commerce
Dancer's Boutique	Dance apparel	5	Omaha Chamber of Commerce
Flywheel	WordPress hosting co.	10	Omaha Chamber of Commerce
Union Pizzeria	Restaurant	10	Omaha Chamber of Commerce
Sporting News Grill	Restaurant	10	Omaha Chamber of Commerce
Southport West	Business development	2	Omaha Chamber of Commerce
Silverhammer Surveillance	Systems	5	Omaha Chamber of Commerce
Maui Wowi Hawaiian	Coffee & smoothie store	5	Omaha Chamber of Commerce
Dorwart Law	Firm	3	Omaha Chamber of Commerce
Safari Preschool	Preschool	3	Omaha Chamber of Commerce
Hawk's Pizza	Food truck	1	Omaha Chamber of Commerce
Bouquet	Flower shop	4	Omaha Chamber of Commerce
Surly Chap Barber	Shop	2	Omaha Chamber of Commerce
Papillion Anytime Fitness	Center	5	Omaha Chamber of Commerce
Lone Mountain Truck Leasing	Truck leasing	4	Omaha Chamber of Commerce
Michael's (72nd)	Arts & crafts	60	Omaha Chamber of Commerce
Chick fil-A -Papillion	Restaurant	90	Omaha Chamber of Commerce
Boys & Girls Club-Westside	Technology center	10	WOWTV

EXPANSIONS

Fireplace Stone & Patio
Comfort Keeper's
Kirn Middle School
Lauritzen Outpatient Cntr.
Spirit Word
Choice Custom Framing
Lauritzen Gardens
Hy-Vee (Applewood)
D-3 Financial
Security National Bank
Omaha Performing Arts
Nebraska Medicine
Waste Management Inc.
RH Land Management

PROJECT

Name changed
In-home care
Addition and remodel
Medical Outpatient center
Moved to new location
New location
Conservatory
Remodeled
Expanding staff
Rebuild branch bank
Purchased parking lot
Name change from UNMC
Purchased Deffenbaugh Disposal
Purchased Blue Lion Center

JOB

0
0
0
0
0
0
0
0
10
0
0
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0
0

SOURCE OF INFO

Omaha Chamber of Commerce
Omaha World Herald
Omaha World Herald

SOUTHEAST

BEATRICE

- Mitzi K's day spa
- Dollar Tree
- Pipeline Clothing

YORK

- The Ruche Boutique
- Dickey's BBQ
- K9 Kennels
- Willow Station

Nebraska City

- CHI Health St. Mary's Hospital and Nebraska City Medical Clinic

LOUISVILLE

- Pinnacle Bank

FALLS CITY

- Christina's Art Gallery
- Humane Society

Fillmore County

- All-American Book Bindery

NORTHEAST

WAUSA

- Elite Diesel & Automotive

WISNER

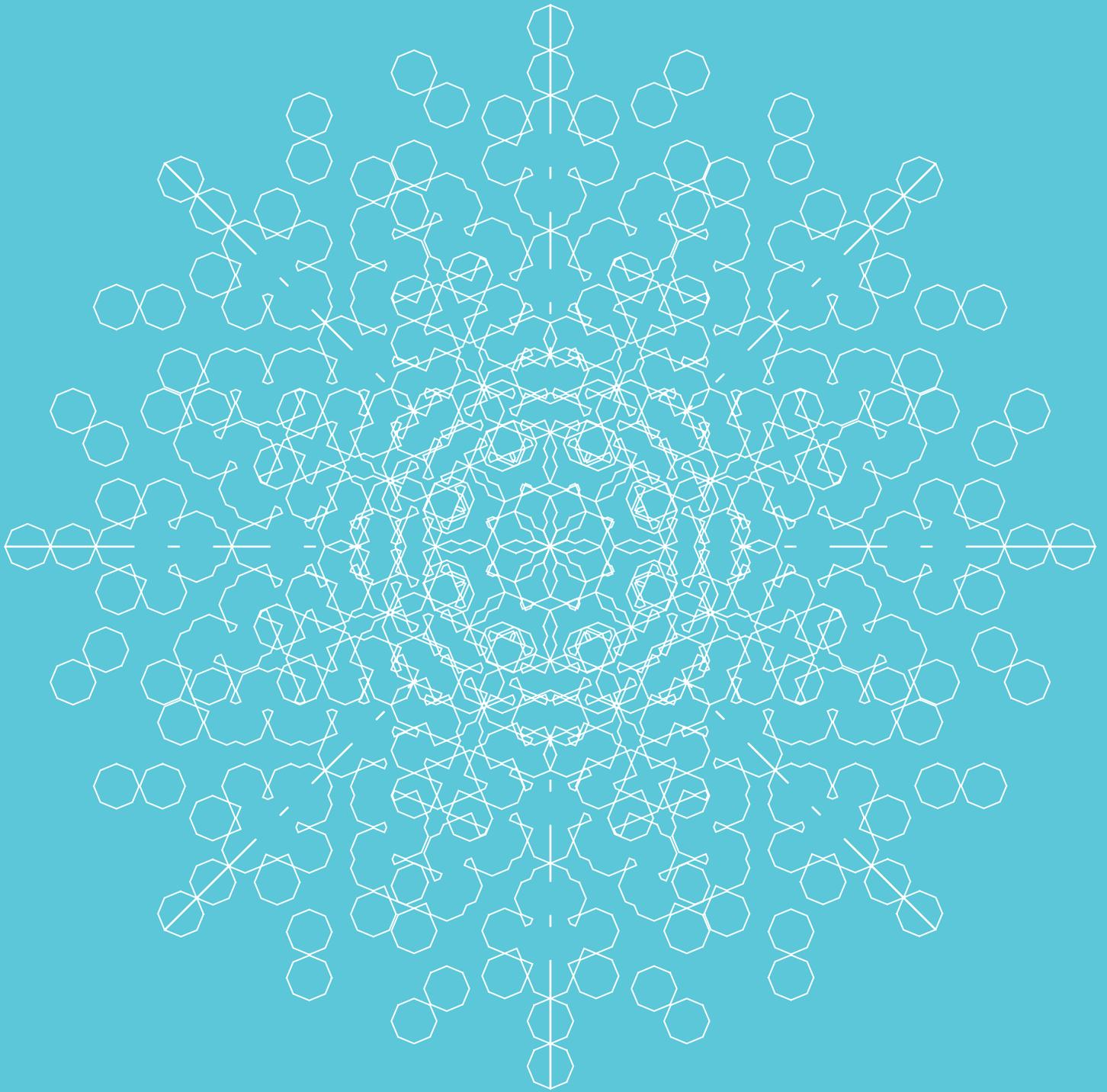
- Jo's Angels

NORFOLK

- Serendipity

SCRIBNER

- Z's Bar and Grill



HOLIDAY TRAVEL AND THE IMPACT OF TRAVEL

Jennifer Gildersleeve, Research Analyst

Millions of Americans travel over the holidays annually. For whatever reason people choose to take a trip, travel has a great effect on both the national economy and the economy right here in Nebraska. Many people are either employed in the travel and tourism industries or employed as a result of travel spending by consumers.

HOLIDAY TRAVEL FORECASTS

About 46.3 million Americans were expected to travel at least 50 miles from home during the 2014 Thanksgiving holiday (Wednesday-Sunday), the highest number since 2007 and a 4.2 percent increase over 2013. (1) According to a 2013 report by AAA and IHS Global Insight, 94.5 million people were expected to travel during the year-end holiday travel season last year, defined as December 21, 2013-January 1, 2014. This was the most people predicted to travel during the winter holiday season since 2008. (3)

HOLIDAY TRAVELERS



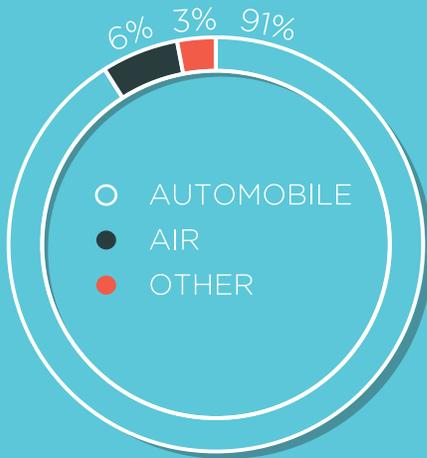
SOURCE: AAA/IHS GLOBAL INSIGHT

About 65% of those surveyed in a recent holiday travel report planned to travel over the six weeks from Thanksgiving 2014 to New Year's 2015. (4) Nearly three-fourths of those traveling domestically planned to cross state borders to reach their Thanksgiving destination this year while 14 percent planned to travel internationally. (5) Christmas is expected to be the most traveled holiday this year, with 68 percent of travelers planning to take a trip during this time. (4)

HOW AMERICANS TRAVEL DURING THE HOLIDAYS

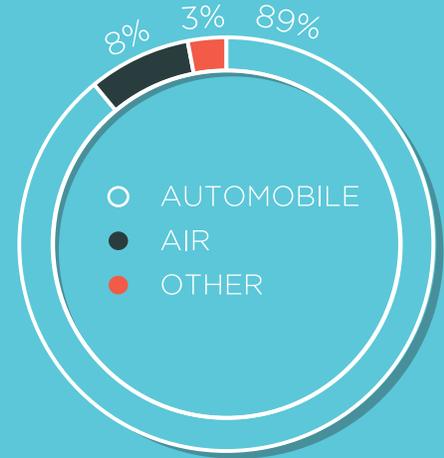
Most travelers during the Thanksgiving and winter holidays either drive or fly to their destination.

2013 ESTIMATED WINTER HOLIDAY / YEAR-END TRAVEL MODE OF TRANSPORTATION



SOURCE: AAA/IHS GLOBAL INSIGHT

2014 PROJECTED THANKSGIVING TRAVEL MODE OF TRANSPORTATION



SOURCE: AAA/IHS GLOBAL INSIGHT

HOLIDAY TRAVEL BY AUTOMOBILE

The vast majority of holiday travelers get to their destination by driving. Almost 90 percent of holiday travelers were expected to travel by automobile during the 2014 Thanksgiving holiday, a 4.3 percent increase from last year. Around 41.3 million total travelers were expected to travel by automobile this Thanksgiving holiday. (1) This is the highest volume travelling by car for Thanksgiving since 2007 and the third highest since 2000. Last year, 91 percent of winter holiday/year-end travelers were expected to travel by car. (3)

HOLIDAY TRAVEL BY AIR

More people appear to be flying to their holiday destination than in the previous years. About 3.5 million Americans were projected to fly to their destination during the 2014 Thanksgiving holiday, the highest level since 2007. (1) This year, two thirds of those that plan to travel between Thanksgiving and New Year's plan to take at least one flight during that time. (4)

According to the Department of Transportation, departures from the Lincoln and Omaha airports nearly doubled in 2013 over 2012 for the winter holiday travel period: from 92 in 2012 to 171 in 2013 from Lincoln and from 652 to 1,196 departures from Omaha. The winter holiday travel period, which can vary in length but last year was defined as Dec. 14 to Jan. 3 by the air travel industry, saw the most overall flights since 2010. (6)

TOTAL FLIGHTS DURING WINTER HOLIDAY SEASON



TRAVEL SPENDING

Travelers were expected to spend nearly \$800 per household around the winter holidays in 2013, and an average of \$573 over Thanksgiving 2014. (2)(3) Just 11 percent of travelers planned on spending less this holiday season, while around 30 percent planned to spend more than last year. Over half of all travelers were willing to spend up to \$2,500 this year on holiday season travel. (4)

Travelers spend that money on different things. Food and beverages account for around 22 percent of holiday travel budgets and shopping accounts for 20 percent. Travelers allocated about 31 percent of their Thanksgiving travel budget this year to fuel costs, according to AAA. Around 70 percent of travelers planned to dine out during their Thanksgiving trip and 59 percent planned to shop. (2)

ECONOMIC IMPACT OF TRAVEL

IMPACT OF TRAVEL IN NEBRASKA

According to a 2013 report, direct travel spending in Nebraska generated 36,100 jobs with earnings near \$600 million in 2012. About 80 percent of these generated jobs were in leisure and hospitality. Additionally, 16,470 jobs were generated indirectly through travel spending in Nebraska. In 2012, travel-generated income and sales taxes made up about 3.6 percent of all state and local tax revenues in Nebraska, excluding property taxes. (7)

The U.S. Travel Association, a group representing the travel industry, stated that domestic and international travelers to Nebraska spent \$4.4 billion in 2012 and generated 44,300 jobs. The same organization notes that for every \$1 million spent in Nebraska by travelers, about 10 jobs are created. (8)

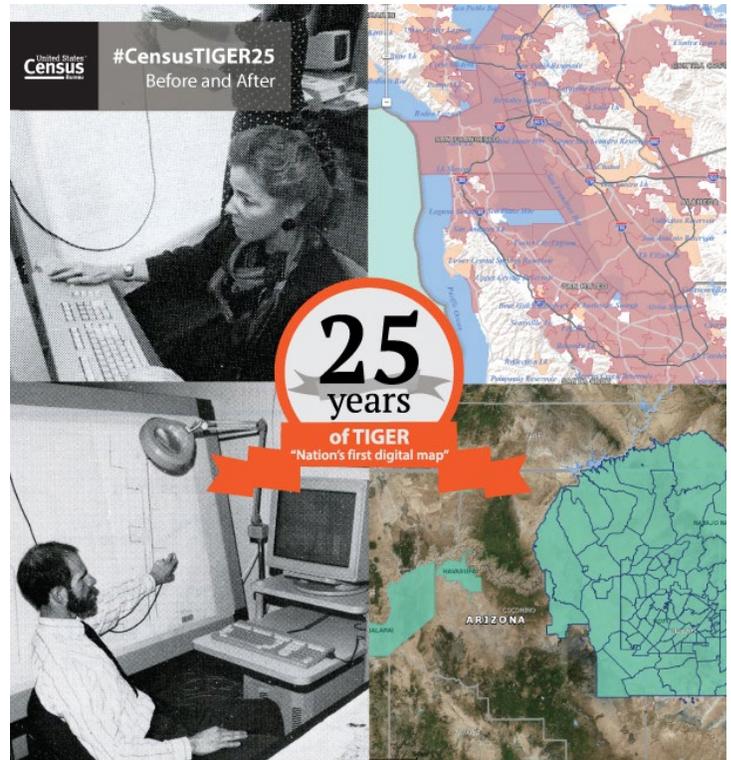
MAP FACTS 25 YEARS OF TIGER

TOPOLOGICALLY INTEGRATED GEOGRAPHIC ENCODING AND REFERENCING DATABASE

Jodie Meyer, Research Analyst

This month we want to wish a Happy Birthday to a product that paved the way for many of the programs and resources we utilize to bring you Map Facts each month. This year marks 25 years since the creation of the Topologically Integrated Geographic Encoding and Referencing (TIGER) database. The TIGER database is a comprehensive collection of maps of U.S. roads, boundaries, and water that are used for mapping.

Maps are not the first thing most people think of when they think of the Census, but geography plays a big role in creating surveys, collecting data, and visualizing data. The Census has been in the business of making maps since the 1860s. In 1874 the Census published the first Statistical Atlas of the United States, a groundbreaking publication containing innovative data



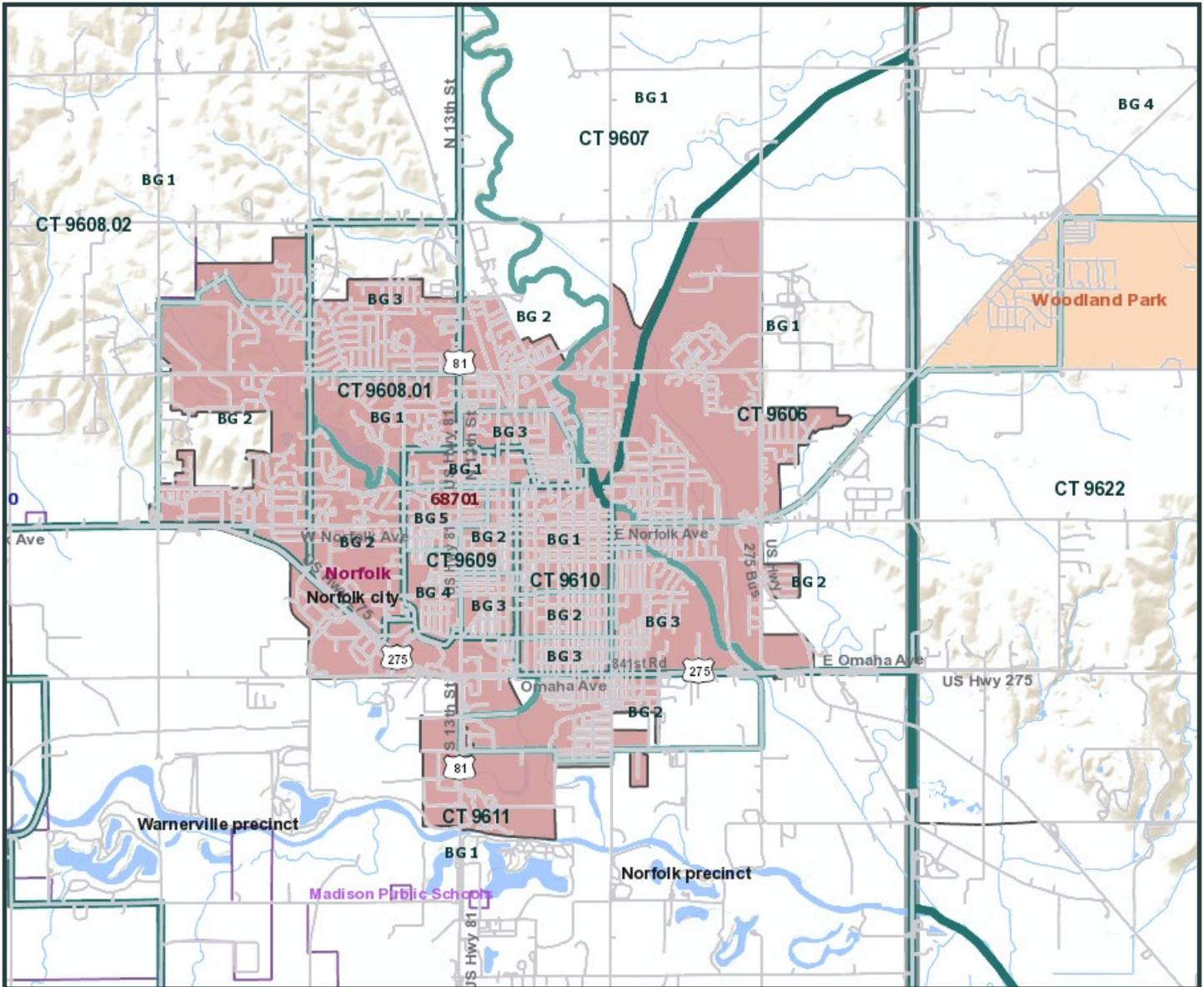
Source: US Census Bureau

visualizations and mapping techniques.

Over a century later, Census employee James Corbett devised a system of map topology that ensured correct geographic relationships. This new system provided a mathematical base for future Geographic Information Systems (GIS) work, sparking the development of computer cartography. GIS is the basis for most mapping products in use today.

Through the 1970s and 1980s, the first areas to become digitized were urban areas and only census tracts, or geographic regions, in these metropolitan areas were digitized. For the rest of the country, enumerators (those who worked at the Census) had to manually geocode addresses and use a variety of printed maps to assign the correct geographic detail to records. None of the maps being utilized to manually assign geographic details used the same scale, making the task of putting everything together challenging. A digital uniform map was needed.

In preparation for the 1990 Census, the Census Bureau worked with the U.S. Geological Survey to create such a map. In 1989, the TIGER database became the first national digital map of roads, boundaries, and water. It was created by the United States Census Bureau for the 1990 Census to aid with the decennial count and bring the mapping process even further into the digital age.



Source: US Census Bureau

The TIGER database is still in use today and is updated annually, providing files to be used with an assortment of mapping programs. All of these files are free to use and contain a variety of official government boundaries. The Nebraska Department of Labor often uses these files to create maps for Map Facts, as part of the process to determine survey samples for studies, and for use in a variety of publications.

For more information on TIGER and to access the products available, please visit:

<http://www.census.gov/geo/maps-data/data/tiger.html>

Source:

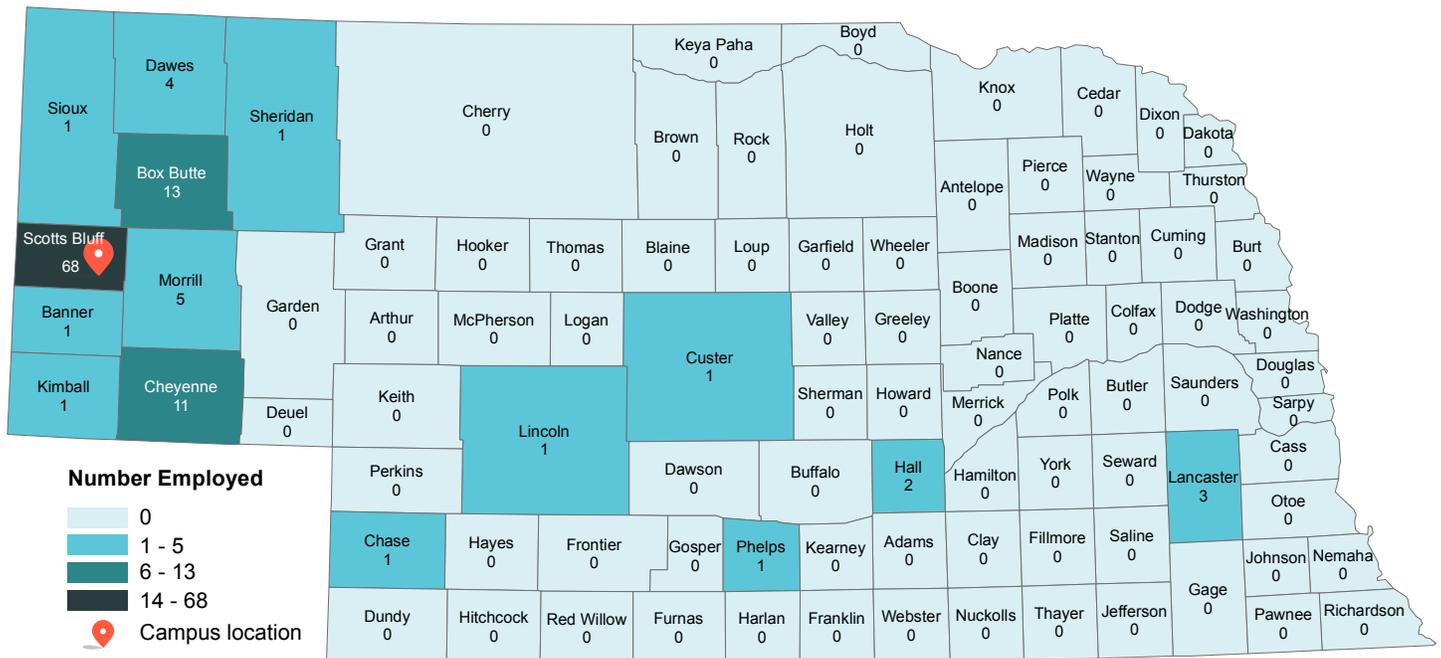
1. Thompson, John H. Director's Blog. U.S. Census Bureau. [Online] November 20, 2014. [Cited: November 24, 2014.] <http://directorsblog.blogs.census.gov/2014/11/20/happy-25th-anniversary-tiger/>.

GRADUATE OUTCOMES: WESTERN NEBRASKA COMMUNITY COLLEGE

Mary Findlay, Research Analyst

There were 288 Western Nebraska Community College graduates between July 1, 2011 and June 30, 2012. Of these graduates, 159 (55 percent) were working in Nebraska in the first quarter of 2013, a 1 percent decrease from the previous year. Nearly two-thirds of the graduates (64 percent) were female. Female graduates (65 percent) were more likely to be working in the state than male graduates (46 percent).

There was at least one graduate employed in 15 of the state's 93 counties. Six out of 10 graduates (68) worked in Scotts Bluff County followed by Box Butte (13), and Cheyenne (11).



INDUSTRY EMPLOYMENT AND WAGES

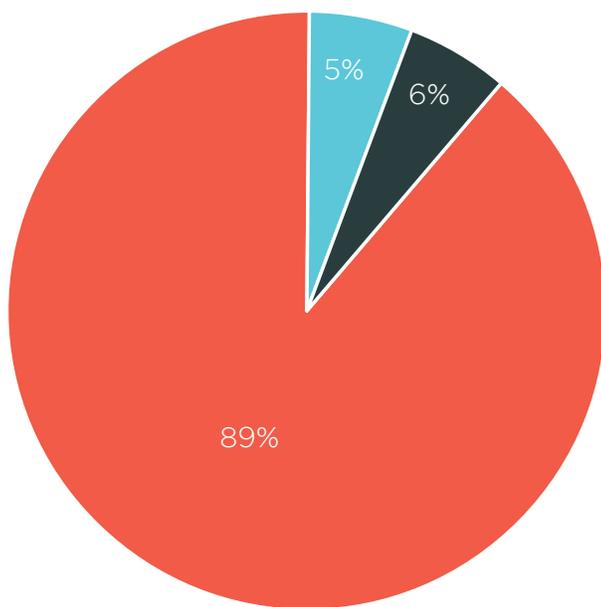
The health care industry employed the highest number (59) of graduates working in the state in the first quarter of 2013, followed by the retail trade industry with 24. These two industries comprised about half (52 percent) of the graduates working in Nebraska and included graduates from all fields of study. The seven graduates employed in the manufacturing industry had the highest discloseable estimated average annual wage of \$45,434, followed by the 59 graduates employed in the health care industry with \$29,217.

Nursing graduates were likely to be working in the health care industry. All registered nursing graduates and 89 percent of licensed practical nursing graduates working in the state were employed in the health care industry. While it is not possible to determine their occupations, it seems likely that many are working in an area related to their educational field of study.

FIELDS OF STUDY, EMPLOYMENT AND WAGES

There were 13 degrees/fields of study that had 80 percent or more of the graduates working in the state. A total of 79 students graduated from these programs, with 68 working in Nebraska in the first quarter of 2013.

INDUSTRY OF EMPLOYMENT FOR LICENSED PRACTICAL NURSING GRADUATES WORKING IN NEBRASKA



- HEALTHCARE
- LEISURE AND HOSPITALITY
- PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

Health care fields of study contributed two of the top five highest number of graduates working in the state. Overall, the highest number (30) of graduates working in the state was in the one to two-year award licensed practical nursing field of study. The second highest number of graduates (26) working in Nebraska were in the associate degree liberal arts and sciences field of study.

There were seven fields of study with a total of 46 graduates working in the state and earning estimated average annual wages above \$30,000 per year. Four of the seven fields of study producing the highest wages were technical fields, the remaining three were in registered nursing, business administration and social work fields of study.

For more graduate outcomes information, contact the Nebraska Department of Labor's Office of Labor Market Information 402-471-2600 or Imi_ne@nebraska.gov.

ECONOMIC INDICATORS MONEY SUPPLY M2

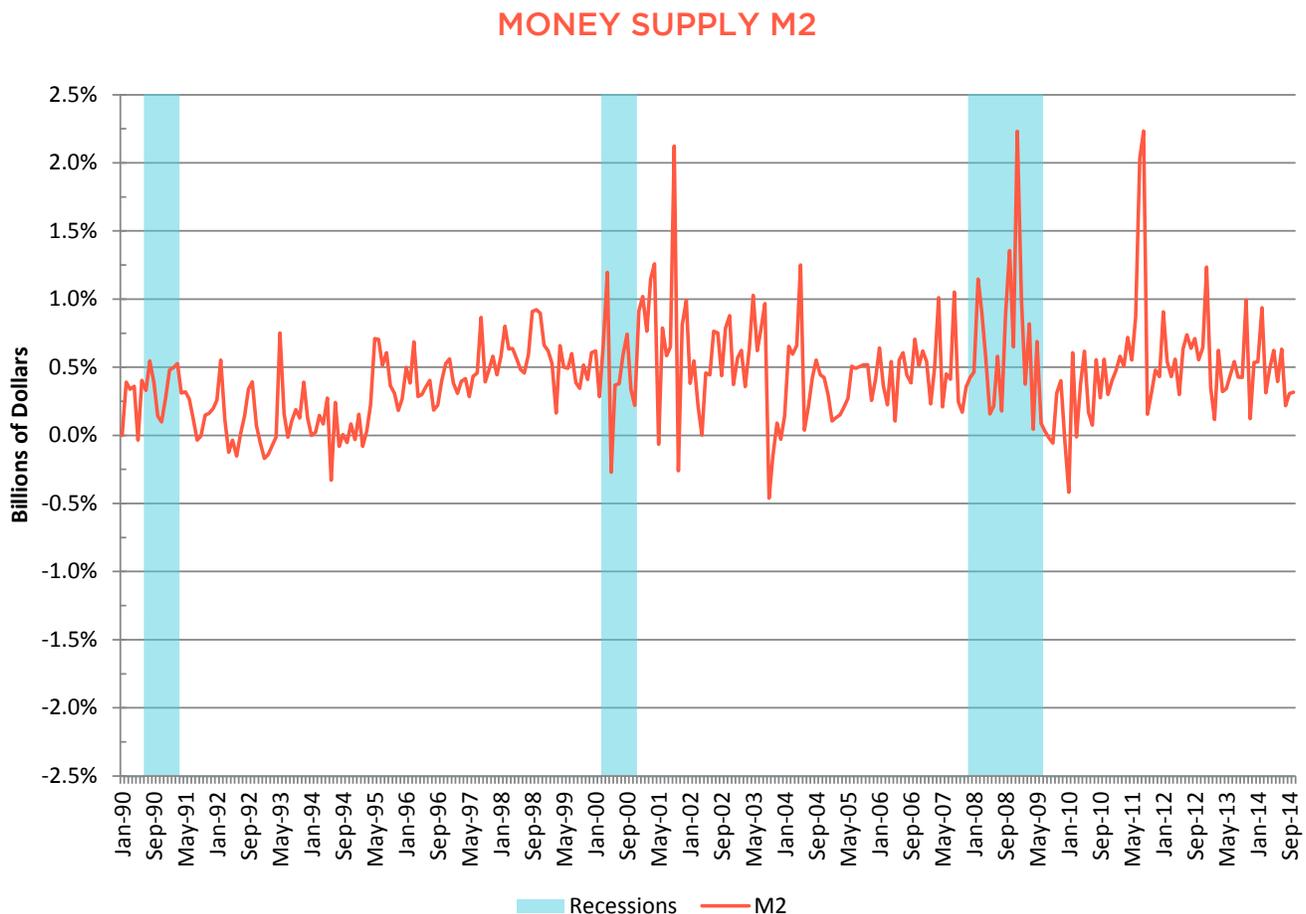
Kermit Spade, Research Analyst

In each new issue of Trends, the economic indicators section will feature a chart or graph focused on one of the economic indicators listed on the next page. This month, we'll be focusing on Money Stock, M2.

According to the Federal Reserve:

“M1 and M2 are progressively more inclusive measures of money: M1 is included in M2. M1, the more narrowly defined measure, consists of the most liquid forms of money, namely currency and checkable deposits. The non-M1 components of M2 are primarily household holdings of savings deposits, small time deposits, and retail money market mutual funds.”

To learn more visit <http://www.federalreserve.gov/releases/h6/about.htm>.



Metric	Current Time Period	Change Over Last Quarter/Month		
		United States	Midwest Region	Nebraska
Real GDP, billions of chained 2009 dollars	3rd Quarter, 2014	+3.5%	-	-
Effective Federal Funds Rate	October, 2014	0.00%	-	-
Balance on the US Current Account, in millions of dollars	1st Quarter, 2014	-3.5%	-	-
Barrel of Crude Oil, WTI-Cushing, Spot Price	October, 2014	-\$8.81	-	-
Employment Cost Index	3rd Quarter, 2014	+0.7%	-	-
Producer Price Index: All Commodities	October, 2014	-1.4%	-	-
Average Weekly Manufacturing Hours	October, 2014	0.0	-	-0.4
House Price Index	2nd Quarter, 2014	+2.2%	+2.0%	+1.9%
Consumer Price Index, not seasonally adjusted	October, 2014	-0.3%	-0.5%	
Unemployment Rate, seasonally adjusted	October, 2014	-0.1%	-0.1%*	-0.2%
New Private Housing Units Authorized by Building Permits	October, 2014	+6.1%	-9.3%	-18.3%*
Net Taxable Sales	August, 2014	-	-	1.0%
Money Stock, M2	October, 2014	+0.3%	-	-
University of Michigan, Consumer Sentiment Index	October, 2014	`	-	-

* Data is lagged one month.

Sources:

1. Federal Reserve Bank of St. Louis. Effective Federal Funds Rate (FEDFUNDS). [stlouisfed.org/](http://research.stlouisfed.org/fred2/series/fedfunds)
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